



State of Michigan

Records Management Services



eSignature Solution

Tip Sheet: Creating eSignature Transactions

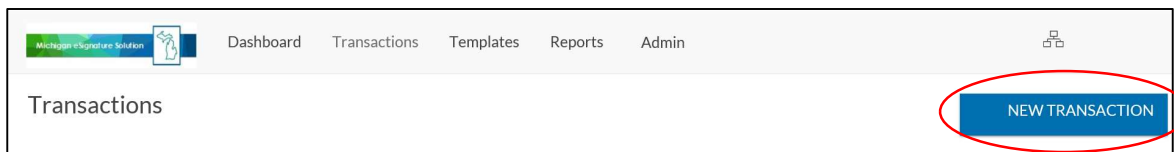
This tip sheet contains the high-level steps for creating an eSignature transaction. A transaction is an eSignature process that results in a signed document(s). The sender's agency is charged for each transaction that is sent using the eSignature Portal.

Accessing eSignature Portal

Go to MiLogin and select Enterprise eSignature Sender. Note: Senders are encouraged to use the [Google Chrome](#) or [Microsoft Edge](#) internet browsers.

Creating Transactions

In the dashboard, click on the "New Transaction" button, and the Create New Transaction screen will open.



Naming Transactions

The transaction name is a required field. See the [Naming Transactions Tip Sheet](#) for important information about naming strategies for transactions. Once your transaction is named click the Create button.

The screenshot displays the 'Create New Transaction' form. A modal dialog box is open, prompting the user to 'Name your transaction'. The dialog includes the text 'By adding a name you are starting the transaction process.' and buttons for 'DISMISS' and 'NEXT'. The form in the background has a 'Name*' field, a 'Use Template' dropdown menu, and 'SETTINGS' and 'CREATE' buttons at the bottom.



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Adding Document(s)

Each transaction can contain one or multiple documents. To add document(s), either drag and drop the files to upload, or click on the “Add Document” plus sign to navigate to where the documents are stored. Note: By default, the Electronic Disclosures and Signatures Consent form is attached to each transaction.

The documents will be listed in numerical order. Re-arrange the document order as needed by dragging the document up or down the list.

Adding Recipients

After the document(s) are added to the transaction, add the recipients (signers and reviewers) to the transaction. When adding recipients, First Name, Last Name, and Email are required fields. Note: the portal will remember recipients that were used in previous transactions.



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Records Management Services



Parallel Signing: If the transaction should be sent to all recipients at the same time (concurrently), do not click on the Set Signing Order slider.

Sequential Signing: If the recipients should receive the transaction in the order of the list (consecutively), click on the Set Signing Order slider. Change the signing order by dragging a recipient up or down on the recipient list.

Recipients

Set signing order ☐

| | | | | Title | Company |
|---|--------|---------|----------------------------|----------------------|-------------------|
| 1 | Jennie | Johnson | jenniejohnson213@gmail.com | | |
| 2 | Brice | Sample | sampleb@michigan.gov | DTMB-Records Manager | State of Michigan |

+ ADD RECIPIENT

Recipients

Set signing order ☒

| | | | | | | |
|---|----------|--------|-----------------------|----------------------|-------------------|-----|
| 1 | Jennifer | Green | greenj25@michigan.gov | DTMB-RMS Analyst | State of Michigan | ... |
| 2 | Brice | Sample | sampleb@michigan.gov | DTMB-Records Manager | State of Michigan | ... |

+ ADD RECIPIENT

Recipient Settings

Review and customize the settings for each recipient by clicking on the 3 dots to the right of the recipient name and selecting Settings.

Recipients

| | | | | | | |
|---|----------|-------|-----------------------|------------------|-------------------|-----|
| 1 | Jennifer | Green | greenj25@michigan.gov | DTMB-RMS Analyst | State of Michigan | ... |
|---|----------|-------|-----------------------|------------------|-------------------|-----|

Settings

Remove

Move down



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Transaction Settings

Click on the **SETTINGS** button at the bottom of the create new transaction screen to review and modify the Transaction Settings. Most transactions will not require the use of these options.

Recipients

| NAME | LAST NAME | EMAIL | ROLE | ORGANIZATION |
|----------|-----------|-----------------------|------------------|-------------------|
| Jennifer | Green | greenj25@michigan.gov | DTMB-RMS Analyst | State of Michigan |

[+ ADD RECIPIENT](#)

Transaction details

Name*
Statement of Work MI-558

Description

Message to all recipients (optional)

[SETTINGS](#)

SETTINGS

Language: English

Timezone: (GMT 0:00) GMT

Enable in person signing: ☐

Review before completion: ☐

Enable notarization: ☐

Enable accessibility: ☐

Email Reminders: [CONFIGURE](#)

Expiration

Type: Date

Expiry Date:

Field Formatting

Font Size: 12px (Default)

Designer Screen

Click the Next button in the Create New Transaction screen, and the Designer screen will open. The Designer screen has three sections: Recipients and Fields are on the left side, the document(s) to be signed are in the middle, and documents and settings are on the right side. The Designer screen is used to designate the actions that recipients will take when receiving the document. If no actions are assigned to a particular recipient, they will receive the transaction for review, but it will continue with the workflow without waiting for them to do anything. If a recipient must take an action, they must either sign or initial the document in addition to the other tasks.



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Michigan eSignature Solution Dashboard Transactions Templates Reports Admin

Alternate Work Schedule Re... *Draft* SEND TO SIGN

RECIPIENTS

- Jennifer Green
- Brice Sample

☐ Accept Only

FIELDS

Signature

IC - Signer Initials

Alternate Work Schedule Request
Michigan Department of Technology, Management and Budget
REFER TO POLICY 200.11 ALTERNATIVE WORK SCHEDULES
NOTE: NO OVERTIME PAY IS AUTHORIZED IN ESTABLISHING AN ALTERNATIVE WORK SCHEDULE.
OVERTIME ELIGIBLE EMPLOYEES MAY NOT WORK IN EXCESS OF 40 HOURS IN A WEEK.

| | | |
|---|-------------------------|-----|
| Employee Name Jennifer Green | Employee ID 12345678 | TKU |
| Division DTMB- LOS | Position Code and Level | |
| Official Work Station Location 3400 N Grand River Ave Lansing, MI | Bargaining Unit | |

REQUESTED WORK SCHEDULE
FIRST WEEK OF PAY PERIOD

| | SUN | MON | TUES | WED | THURS | FRI | SAT |
|-------------------|-----|--------|--------|--------|--------|--------|-----|
| # hours scheduled | | | | | | | |
| Start Time | | 7:00AM | 7:00AM | 7:00AM | 7:00AM | 7:00AM | |
| End Time | | 4:30PM | 4:30PM | 4:30PM | 4:30PM | 4:30PM | |
| Work Location | | | | Home | | | |

DOCUMENTS

Drag & drop files to upload

Electronic Disclosure...

1 2

Each recipient is assigned a unique color code for the fields that they need to take action on. First, select a recipient, then choose the fields below that apply to that recipient. The recipient's signature or initials must be enabled before other fields are available.

Once a field is highlighted, the "Field Settings" become available on the right side. These settings can be used to make a field required or optional, to allow different types of signatures, to specify the values of drop-down fields, and more.

Once all of the necessary fields are added to the document(s), the transaction is ready to be sent for signing. Click "Send to Sign." A confirmation screen will pop up asking you to confirm sending the transaction. Click send.

SEND TO SIGN

FIELD SETTINGS
eArLLuBhY5Q5

Settings

Field Name

Recipient
Jennie Johnson

Signature Type
Click-to-Sign

Is optional ☐

Field Formatting

Font Size
Inherit from parent



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Alternate Work Schedule Re... *Draft*

SEND TO SIGN

RECIPIENTS

Jennifer Green

Brice Sample

☐ Accept Only

FIELDS

Signature

| | | | | | | | | | |
|--|-----------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|
| Start Time | | | | | | | | | |
| End Time | | | | | | | | | |
| Work Location | | | | | | | | | |
| Lunch Period | <input type="checkbox"/> 1/2 hour | <input type="checkbox"/> 1 hour | <input type="checkbox"/> 1 hour | <input type="checkbox"/> 1 hour | <input type="checkbox"/> 1 hour | <input type="checkbox"/> 1 hour | <input type="checkbox"/> 1 hour | <input type="checkbox"/> 1 hour | <input type="checkbox"/> 1 hour |
| Employee Signature | Click-to-Sign | | | | | | | Date | |
| Approvals | | | | | | | | | |
| <input type="checkbox"/> Approved <input type="checkbox"/> Disapproved | Click-to-Sign | | | | Signature | | | | |
| Division / Bureau Director Name | | | | | Signature | | | | |
| Chief Deputy/CIO Signature if required | | | | | Effective Date | | | | |
| Appointing Authority Signature | | | | | Effective Date | | | | |
| *Briefly explain if disapproved: | | | | | | | | | |

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FIELD SETTINGS
MDDI3sYG8SAD

Settings

Field Name

Recipient
Brice Sample

Signature Type
Click-to-Sign

Transaction Starts

Once the transaction is sent, the recipients will receive an email inviting them to the signing ceremony. Recipients will be prompted to complete the transaction by signing or filling out the fields specified on the document(s).

After the recipient(s) complete their role in the signing ceremony, the document will indicate the transaction is complete, and each recipient will be able to view the document(s).